

SPIIL Revision Instrument - FINAL

State: MONTANA

**STATE PLAN FOR
INDEPENDENT LIVING
(SPIIL)**

Chapter 1, Title VII of the Rehabilitation Act of 1973, as Amended

**STATE INDEPENDENT LIVING SERVICES (SILS) PROGRAM
PART B**

**CENTERS FOR INDEPENDENT LIVING (CIL) PROGRAM
PART C**

FISCAL YEARS 2008-2010

Effective Date: October 1, 2007

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PART I: Assurances

State of: MONTANA

Section 1: Legal Basis and Certifications

- 1.1 The designated State unit (DSU) eligible to submit the State Plan for Independent Living (SPIL or the plan) and authorized under State law to perform the functions of the State under the State Independent Living Services (SILS) and Centers for Independent Living (CIL) programs is The Montana Department of Public Health and Human Services –Disability Services Division (insert name of DSU). *34 CFR 76.104(a)(1) and (2); 34 CFR 364.22(a)*
- 1.2 The separate State agency eligible to submit the plan and authorized under State law to provide vocational rehabilitation (VR) services to individuals who are blind is NA (insert name of separate State agency). Indicate N/A if not applicable. *34 CFR 76.104(a)(1) and (2); 34 CFR 364.20(d) and 364.22(c)*
- 1.3 The Statewide Independent Living Council (SILC) that meets the requirements of section 705 of the Act and is authorized to perform the functions outlined in section 705(c) of the Act in the State is Montana Statewide Independent Living Council (insert name of SILC). *34 CFR 364.21(a)*
- 1.4 The DSU and, if applicable, the separate State agency authorized to provide VR services to individuals who are blind, and the SILC are authorized to jointly develop, sign and submit this SPIL on behalf of the State, and have adopted or otherwise formally approved the SPIL. *34 CFR 76.104(a)(7); 34 CFR 364.20(c) and (d)*
- 1.5 The DSU, and, if applicable, the separate State agency authorized to provide VR services to individuals who are blind, may legally carry out each provision of the plan and will comply with all applicable Federal statutes and regulations in effect with respect to the three-year period it receives funding under the SPIL. *34 CFR 76.104; 34 CFR 80.11(c)*
- 1.6 The SPIL is the basis for State operation and administration of the program. All provisions of the SPIL are consistent with State law. *34 CFR 76.104(a)(4) and (8)*
- 1.7 The representative of the DSU and, if applicable, of the separate State agency authorized to provide VR services to individuals who are blind, who has the authority under State law to receive, hold, and disburse Federal funds made available under the SPIL and to submit the SPIL jointly with the SILC chairperson is Joe Mathews, Administrator of Disability Services Division (Name, title of DSU director) and NA (Name, title of separate State agency director, if applicable). *34 CFR 76.104(a)(5) and (6)*

Section 2: SPIL Development

- 2.1 The plan shall be reviewed and revised not less than once every three years, to ensure the existence of appropriate planning, financial support and coordination, and other assistance to appropriately address, on a statewide and comprehensive basis, the needs in the State for:
- The provision of State independent living services;
 - The development and support of a statewide network of centers for independent living; and
 - Working relationships between programs providing independent living services and independent living centers, the vocational rehabilitation program established under title I, and other programs providing services for individuals with disabilities. *34 CFR 364.20(f)*
- 2.2 The DSU and SILC conduct public meetings to provide all segments of the public, including interested groups, organizations and individuals, an opportunity to comment on the State plan prior to its submission to the Commissioner and on any revisions to the approved State plan. *34 CFR 364.20(g)(1)*
- 2.3 The DSU and SILC establish and maintain a written description of procedures for conducting public meetings in accordance with the following requirements. The DSU and SILC shall provide:
- appropriate and sufficient notice of the public meetings (that is, at least 30 days prior to the public meeting through various media available to the general public, such as newspapers and public service announcements, and through specific contacts with appropriate constituency groups and organizations identified by the DSU and SILC);
 - reasonable accommodation to individuals with disabilities who rely on alternative modes of communication in the conduct of the public meetings, including providing sign language interpreters and audio-loops; and
 - public meeting notices, written material provided prior to or at the public meetings, and the approved State plan in accessible formats for individuals who rely on alternative modes of communication. *34 CFR 364.20(g)(2)*
- 2.4 At the public meetings to develop the State plan, the DSU and SILC identify those provisions in the SPIL that are State-imposed requirements beyond what would be required to comply with the regulations in 34 CFR parts 364, 365, 366, and 367. *34 CFR 364.20(h)*
- 2.5 The DSU will seek to incorporate into, and describe in, the State plan any new methods or approaches for the provision of IL services to older individuals who are blind that are developed under a project funded under chapter 2 of title VII of the Act and that the DSU determines to be effective. *34 CFR 364.28*

- 2.6 The DSU and SILC actively consult, as appropriate, in the development of the State plan with the director of the Client Assistance Program (CAP) authorized under section 112 of the Act. *34 CFR 364.20(e)*

Section 3: Independent Living Services

- 3.1 The State, directly or through grants or contracts, will provide IL services with Federal, State, or other funds. *34 CFR 364.43(b)*
- 3.2 Independent living services shall be provided to individuals with significant disabilities in accordance with an independent living plan mutually agreed upon by an appropriate staff member of the service provider and the individual, unless the individual signs a waiver stating that such a plan is unnecessary. *34 CFR 364.43(c)*
- 3.3 All service providers will use formats that are accessible to notify individuals seeking or receiving IL services under chapter 1 of title VII about:
- the availability of the CAP authorized by section 112 of the Act;
 - the purposes of the services provided under the CAP; and
 - how to contact the CAP. *34 CFR 364.30*
- 3.4 Participating service providers meet all applicable State licensure or certification requirements. *34 CFR 365.31(c)*

Section 4: Eligibility

- 4.1 Any individual with a significant disability, as defined in 34 CFR 364.4(b), is eligible for IL services under the SILS and CIL programs authorized under chapter 1 of title VII of the Act. Any individual may seek information about IL services under these programs and request referral to other services and programs for individuals with significant disabilities, as appropriate. The determination of an individual's eligibility for IL services under the SILS and CIL programs meets the requirements of 34 CFR 364.51. *34 CFR 364.40(a), (b) and (c)*
- 4.2 Service providers apply eligibility requirements without regard to age, color, creed, gender, national origin, race, religion or type of significant disability of the individual applying for IL services. *34 CFR 364.41(a)*
- 4.3 Service providers do not impose any State or local residence requirement that excludes any individual who is present in the State and who is otherwise eligible for IL services from receiving IL services. *34 CFR 364.41(b)*

Section 5: Staffing Requirements

- 5.1 Service provider staff includes personnel who are specialists in the development and provision of IL services and in the development and support of centers. *34 CFR 364.23(a)*

5.2 To the maximum extent feasible, a service provider makes available personnel able to communicate:

- with individuals with significant disabilities who rely on alternative modes of communication, such as manual communication, nonverbal communication devices, Braille or audio tapes, and who apply for or receive IL services under title VII of the Act; and
- in the native languages of individuals with significant disabilities whose English proficiency is limited and who apply for or receive IL services under title VII of the Act. *34 CFR 364.23(b)*

5.3 Service providers establish and maintain a program of staff development for all classes of positions involved in providing IL services and, if appropriate, in administering the CIL program. The staff development programs emphasize improving the skills of staff directly responsible for the provision of IL services, including knowledge of and practice in the IL philosophy. *34 CFR 364.24*

5.4 All recipients of financial assistance under parts B and C of chapter 1 of title VII of the Act will take affirmative action to employ and advance in employment qualified individuals with significant disabilities on the same terms and conditions required with respect to the employment of individuals with disabilities under section 503 of the Act. *34 CFR 364.31*

Section 6: Fiscal Control and Fund Accounting

6.1 All recipients of financial assistance under parts B and C of chapter 1 of title VII of the Act will comply with applicable EDGAR fiscal and accounting requirements and will adopt those fiscal control and fund accounting procedures as may be necessary to ensure the proper disbursement of and accounting for those funds. *34 CFR 364.34*

Section 7: Recordkeeping, Access and Reporting

7.1 In addition to complying with applicable EDGAR recordkeeping requirements, all recipients of financial assistance under parts B and C of chapter 1 of title VII of the Act will maintain records that fully disclose and document:

- the amount and disposition by the recipient of that financial assistance;
- The total cost of the project or undertaking in connection with which the financial assistance is given or used;
- the amount of that portion of the cost of the project or undertaking supplied by other sources;
- compliance with the requirements of chapter 1 of title VII of the Act and Part 364 of the regulations; and
- other information that the Commissioner determines to be appropriate to facilitate an effective audit. *34 CFR 364.35(a) and (b)*

7.2 With respect to the records that are required by 34 CFR 364.35, all recipients of financial assistance under parts B and C of chapter 1 of title VII of the Act will submit reports that the Commissioner determines to be appropriate. *34 CFR 364.36*

7.3 All recipients of financial assistance under parts B and C of chapter 1 of title VII of the Act will provide access to the Commissioner and the Comptroller General, or any of their duly authorized representatives, to the records listed in 34 CFR 364.37 for the purpose of conducting audits, examinations, and compliance reviews. *34 CFR 364.37*

Section 8: Protection, Use, and Release of Personal Information

8.1 Each service provider will adopt and implement policies and procedures to safeguard the confidentiality of all personal information, including photographs and lists of names in accordance with the requirements of 34 CFR 364.56(a)(1-6). *34 CFR 364.56(a)*

Section 9: Signatures

After having carefully reviewed all of the assurances in sections 1 - 8 of this SPIL, the undersigned hereby affirm that the State of Montana is in compliance and will remain in compliance with the aforementioned assurances during 2008-2010 (specify the three-year period covered by this SPIL).

The effective date of this SPIL is October 1, 2007 (year)

SIGNATURE OF SILC CHAIRPERSON

DATE

NAME OF SILC CHAIRPERSON

SIGNATURE OF DSU DIRECTOR

DATE

Joe Mathews, Administrator of Disability Services Division
NAME AND TITLE OF DSU DIRECTOR

NA
SIGNATURE OF DIRECTOR OF THE SEPARATE
STATE AGENCY FOR INDIVIDUALS WHO ARE BLIND

DATE

NAME AND TITLE OF THE DIRECTOR OF THE
SEPARATE STATE AGENCY FOR INDIVIDUALS WHO ARE BLIND

Part II: Narrative

Section 1: Goals, Objectives and Activities

1.1 Goals and Mission – 34 CFR 364.42(b)(1)

Describe the overall goals and mission of the State's IL programs and services. The SPIL must address the goals and mission of both the SILS and the CIL programs, including those of the State agency for individuals who are blind as they relate to the parts of the SPIL administered by that agency.

It is the intent of the Montana Statewide Independent Living Council (SILC) and the Department of Public Health and Human Services - Disability Services Division (DSU) to develop and implement a SPIL that will: Make independent living a reality for Montanans with disabilities by promoting and practicing a philosophy of consumer control, development of a network of peer services, self-determination, self-help, equal access, and advocacy in order to maximize independence, integration and full inclusion of persons with disabilities into mainstream Montana.

The following are the goals of the SILS:

Goal one: To provide independent living (IL) services to as many people as possible in Montana. This goal incorporates Summit's Goal 9 and incorporates the SILC's decision to use most of the Part B funds to contract with CILs in Montana.

Goal Two: To provide outreach to unserved and underserved populations in Montana to gain a better understanding of how to provide appropriate services to populations designated as unserved and underserved.

This goal incorporates NCIL's goal 7 and Summit's goal 7.

Goal three: To support a statewide network of CILs.

Goal four: To support involvement with other organizations that promote services or advocacy efforts related to the disability community.

This goal incorporates NCIL's goals 1, 3, and 7; MILP's goals 1 and 2; Summit's goals 3; and LIFTT's goal 3.

Goal five: To develop a statewide network to coordinate and address the local advocacy issues set by the 2006 Independent Living Symposium (note: The Symposium was a statewide conference that included the directors of all Montana CILs, staff from all Montana CILs, board members of some of Montana CILs, SILC members, and IL consumers.) The priority local advocacy issues identified in this collaboration were:

- Transportation – safe, reliable, affordable, accessible
- Housing /including the following:
 - affordable,

- accessible,
- integration,
- home ownership opportunities for persons with disabilities, and
- accommodations
- School transition
- Representation by people with disabilities – nothing about us without us – let the voice of persons with disabilities be heard at meetings/commissions
- Disaster relief planning /make local level follow state laws that are already in place
- Personal assistants background checks & public personal assistants registry

This goal incorporates NCIL's goals 1, 2, and 3; MILP's goals 1 and 2; Summit's goals 1, 3, 5; and LIFTT's goal 3 and 4.

Goal six: To develop a statewide network to coordinate and address the statewide priority issues established at an interactive video conference held in August of 2007 (note: The interactive conference was a statewide conference with 77 participants that included the directors of all but one of Montana CILs, staff from all Montana CILs, board members of some of Montana CILs, SILC members, DSU staff and IL consumers.) The priority statewide issues identified in this collaboration, listed in the order of support each issue received, were:

- Implement a Medicaid Buy-in program that will allow people with disabilities to earn an amount beyond the medically needy level of \$595 and still be able to buy into the Medicaid program at a level based on income.
- Provide funding to expand Montana's network of Centers for Independent Living through the development of new branch offices or expansion of present branch offices.
- Ensure there is a disability history and culture curriculum in the schools. "Disability Education for All".
- Provide funding to equalize the core funding to Montana's Centers for Independent Living.
- Allocate sufficient funding and resources to provide living wages for all direct support professionals such as personal care assistants and benefits that are competitive with others in similar jobs.
- Prioritize the housing needs of persons below 50% of median income, particularly below 30%, and persons with disabilities across housing activity type-including both rental and single family homeownership.
- Funding for programs for youth with disabilities, particularly programs that support development of leadership skills and independent living philosophy and skills.
- Strengthen Local Transportation Advisory Committees (TAC's) through increased involvement of people with disabilities, senior citizens and other transportation users.
- Make all funding based on the values of self-determination by the person with disabilities.
- Develop a comprehensive Money Follows the Person plan.
- Equalize the Medicaid spend-down base to the SSI level and have it adjust yearly.
- Implement "nothing about us without us" in state government planning and decision making.

- Provide financial incentives to personal assistance provider agencies that provide health insurance to personal assistants.
- Improve transition services from high school to adult life.
- Support funding for training modules and other training opportunities that are relevant for direct care staff.

This goal incorporates NCIL's goals 1, 2, 3, and 6; MILP's goals 1 and 2; Summit's goals 1, 2, 3, 5, and 9; and LIFTT's goal 3 and 4.

The following are the mission and goals of Montana's CILs:

The CIL goals that are mentioned above as being incorporated into the SPIL are the CIL goals supported by the plan. The other goals are more local in nature and are supported by funds outside of this plan.

The mission of North Central Independent Living Services (NCILS) is:

This organization is established for the purpose of providing access to a more independent lifestyle for persons with disabilities through advocacy, public education, coordination of services, and information as directed by consumer need. The corporation shall be guided by the principles of consumer control which include as much independence for the person as possible, the chance for a person to experience life to its fullest potential, to advocate for barrier free communities, to give accountability and credibility to a person's own choice with a right to independence. It is our purpose to assure that persons with disabilities are recognized as individuals with the same basic rights, needs and desires as any non-disabled individual.

These rights include but are not limited to: achieving as much physical and psychological independence as their disability will allow; participating in social, recreational, political, religious and community activities and events; accessibility to public transportation, housing, educational and employment opportunities.

The following are NCILS' goals (modified from 2006 704 report):

- Goal 1. Conduct education activities necessary to build an effective network of persons with disabilities to facilitate advocacy and support related to the disability community.
- Goal 2. Conduct activities related to improving housing options for persons with disabilities.
- Goal 3. Conduct activities related to improving transportation options for persons with disabilities.
- Goal 4. Conduct activities related to improving accessibility for persons with disabilities.
- Goal 5. Conduct activities that support the registration of people with disabilities to vote.
- Goal 6. Conduct activities that support the development of a strong peer mentoring network including a component to assist people transitioning from nursing homes back to the community.
- Goal 7. Conduct activities to increase the number of people served who are members of populations that are currently unserved or underserved.

The mission of the Montana Independent Living Project (MILP) is promoting independence for people with disabilities.

The following are MILP's goals (modified from the 2006 704 report):

- Goal 1: Promote and participate in transportation-related advocacy to maintain and expand transportation-related choice and options for consumers in MILP's service area.

- Goal 2: Advocate for increased involvement in the amount and type of transition activities engaged in by consumers and parents.
- Goal 3: Advocate for increased accessibility and program development for individuals with disabilities who experienced domestic violence and sexual assault directly or indirectly in their lives.
- Goal 4: Conduct outreach activities to Hutterite colonies in MILP's service area.
- Goal 5: Provide leadership and technical assistance to the Statewide Independent Living Council and the DSU concerning the SPIL's definition of and approach to funding and providing services to Montana's priority unserved/underserved groups.
- Goal 6: Conduct activities to increase accessibility in their service area.

Summit Independent Living Center's mission is to promote community awareness, equal access, and the independence of people with disabilities through advocacy, education and the advancement of civil rights.

The following are Summit's goals (modified from 2006 704 report):

- Goal 1 Work to improve/expand community living options.
- Goal 2 Work to expand employment opportunities for people with disabilities statewide.
- Goal 3 Expand transportation options in western Montana and across Montana.
- Goal 4 Improve accessibility of communities in western Montana.
- Goal 5 Expand grass-roots advocacy and disability rights movement in Montana.
- Goal 6 Increase community awareness of disability issues.
- Goal 7 Conduct outreach activities to Native Americans, youth with disabilities, senior citizens, people who are deaf, and people living in rural areas of western Montana.
- Goal 8 Conduct activities that will increase the number of consumers served, the goals achieved by consumers, and maintain consumer support services.
- Goal 9 Conduct activities that develop financial resources to support increased services, personnel support, and corporate independence.
- Goal 10 Conduct activities to support personnel and administration development.

Living Independently for Today and Tomorrow's (LIFTT) mission is:

Living Independently for Today and Tomorrow is a Montana non-profit (501 C3) organization committed to empowering persons with disabilities to live freely and equally in Montana through the provision of independent living services which reduce societal barriers.

The following are LIFTT's goals (modified from 2006 704 report):

- Goal 1 Carry out activities related to grant funded initiatives that support independent living objectives.
- Goal 2 Offer consumer trainings to assist with meeting consumer goals and the development of a peer network.
- Goal 3 Conduct advocacy activities in the areas of transportation, accessibility, deaf interpreters, and other issues.
- Goal 4 Engage in collaboration activities in order to support advocacy issues for persons with disabilities and services for persons with disabilities.
- Goal 5 Apply for Community Development Block Grant funds for Billings to continue building ramps in the community. In the other communities, LIFTT will continue to look for funds to build ramps.

Goal 6 Conduct personnel development activities.

1.2 Objectives – 34 CFR 364.42(a)(1) and (d); 34 CFR 364.32; 34 CFR 364.33

1.2A Specify the objectives to be achieved and the time frame for achieving them.

Because many of the CILs goals are incorporated into SILS goals, objectives are only detailed for the SILS goals.

Explanation of procedure for carrying out goals and objectives:

- CIL actions are based upon direction of the CIL director and when necessary will have been approved by the CIL governing board.
- SILC actions are guided by decisions and actions of either the full SILC or the executive committee. The SILC and executive committee provides guidance to the SILC committees that do most of the plan development of SILC initiatives. SILC committees often include non-SILC members. As an example, all SILC committees have at least one CIL director on the committee and all CIL directors serve on at least one SILC committee. So, even though there is only one CIL director on the SILC, all CIL directors are actively involved in the planning process of SILC activities and goals. It should be noted that all four CIL directors sit on the legislative/advocacy committee which is most active in the planning of the overarching goals of the SILC that impact changes to improve the lives of persons with disabilities across Montana.
- The program manager carries out activities as assigned by the SILC, the executive committee, or the other SILC committees. Activities most often assigned include:
 - Arranging meetings of full SILC, committees, and statewide meetings.
 - Research related to a variety of issues and potential resources
 - Draft development of a variety of documents required by activities of the SILC

Goal one: To provide independent living (IL) services to as many people as possible in Montana.

Objective 1: During each year of the plan, at least 200 new consumers will be found eligible and have services initiated by Montana's network of CILs.

Objective 2: During each year of the plan, at least fourteen activities involving local advocacy to improve the lives of persons with disabilities in areas such as housing, transportation, accessibility, and youth transition will be carried out by Montana's network of CILs with SILC members being involved in at least half of the advocacy activities.

Examples include: advocating for increasing the accessible units in local housing programs; recruiting and orienting persons with disabilities to serve on local transportation advisory committees; and developing, coordinating, and promoting a local care giver conference.

With regard to Objectives 1 and 2 of this goal, if the funds are available to the DSU to increase the funding in the CIL contracts, the number of new consumers served will be increased proportionately to the previous cost per consumer. A similar increase can be expected in systems change activities. Also, if the contract funding available decreases a similar decrease in new consumers served and systems change activities can be expected.

Objective 3: Each year of the plan, in order to monitor the provision of services, the DSU program manager will conduct a site visit to review case records, conduct interviews, and other activities necessary to assess the service delivery system of two CILs. As part of the evaluation of this goal, a SILC representative will accompany the program manager on the site visits. Within thirty days following the site visit, a written report will be developed and delivered to the CIL director, with a copy to be delivered to the CIL board. A verbal report will be provided to the full SILC at the SILC meeting following the site visit.

Objective 4: Each year of the plan, the DSU will provide the administrative support necessary to compile the contracts to provide services through the CILs. As part of the evaluation of this goal, the bylaws/budget committee of the SILC will review and provide input on the contracts.

Objective 5: During each year of the grant, the DSU program manager will consult with CIL directors and SILC members to gather information to draft a report for the Governor that will also be distributed to state legislators. The draft will be reviewed by the SILC chair and revised as necessary prior to final distribution.

Goal two: To provide outreach to unserved and underserved populations in Montana to gain a better understanding of how to provide appropriate services to populations designated as unserved and underserved.

Objective 1: Within the first year of the plan, the SILC will invite a representative of the Little Shell tribe to attend a SILC meeting to discuss outreaching with this newly emerging landless tribe in order to increase the awareness of the availability of IL services.

Objective 2: Each year of the plan, each of the CILs under contract with the DSU will conduct at least one systems change activity (see explanation of systems change and examples in goal 1 objective 2) that supports an independent living issue developed by a group of consumers from one of the designated unserved/underserved populations.

Objective 3: Each year of the plan, the SILC will invite representatives from one of the identified unserved/underserved populations to present at a SILC meeting to provide guidance on methods of adapting the four core services to better serve that population.

Objective 4: Before the end of the first year of this plan, the CIL directors will meet with a staff person of the urban Indian centers located in their service area regarding outreach to appropriate consumers served by the urban Indian centers. The CIL directors will report on the outcomes of these meetings by the end of the first plan year. If it is not possible to arrange a meeting with staff of the urban Indian centers, the CIL directors will present evidence of their efforts.

Objective 5: Before the end of the first year of this plan, the CIL directors will meet with a staff person of the Section 121 projects located in their service areas regarding outreach to appropriate consumers served by the 121 projects. The CIL directors will report on the outcomes of these meetings by the end of the first plan year. If it is not possible to arrange a meeting with staff of the Section 121 projects, the CIL directors will present evidence of their efforts.

Objective 6: Each year of the plan, at a SILC meeting, the CIL directors will present the initiatives they have carried out that year to out reach to the identified unserved/underserved populations groups and provide data and other evidence of the outcomes of those efforts.

Objective 7: Throughout the plan, the SILC will maintain a youth member (age 18-28) on the SILC. If the youth member ages out and continues on the SILC, another member meeting the age criteria will be recruited when a vacancy occurs.

Objective 8: Throughout the plan, the SILC will have an active unserved/underserved committee that meets at least three times per year and provides guidance to the SILC on unserved/underserved populations, including evaluation of the efforts to outreach to the unserved/underserved populations.

Objective 9: Throughout the plan, there will be a director of 121 projects on the SILC and that member will be the chair of the unserved/underserved committee.

Objective 10: In order to meet the cross-disability responsibility of IL, the SILC will have one disability specific presentation at a SILC meeting each year of this plan to keep current with needs and initiatives of specific disabilities.

Goal three: To support a statewide network of CILs.

Objective 1: At least every four years, an agreed upon procedures (AUP) review of financial procedures will be arranged by the DSU at each CIL to assist the CILs in developing effective financial procedures.

Objective 2: Each year of the plan, by January 1, the DSU will coordinate and report on a consumer satisfaction survey of CIL consumers. A report on the analysis of the results will be presented to the SILC at the SILC meeting following the completion of the analysis. The report for each CIL will be presented to the director of the CIL within a week of completion of the report.

Objective 3: By October 1, 2008, in order to explore increasing CILs' fee for service income obtained from VR for services provided to VR consumers as part of their employment plan, the DSU program manager will research fee for service arrangements and levels between CILs and rehabilitation services in other states and develop a report on the topic to present to the DSU administrator and CIL directors by March 1, 2009.

If the research reveals potential practices for increasing the fee for services paid by the Montana Rehabilitation Services Program to Montana CILs, a work group consisting of Rehabilitation Services personnel (including at least one regional administrator, one field staff, and one central office administrator) and IL representatives (including at least one CIL Director and two SILC members) will be formed by July 1, 2009. The work group will review potentially useful practices identified in the research. Where there is consensus that similar practices could work in

Montana, an implementation plan may be developed. The work group will complete their review and plan development by March 1, 2010.

The DSU program manager will monitor implementation of the plan and carry out any evaluation activities the work group develops for two years following plan implementation. The program manager will submit quarterly reports on the monitoring findings and evaluation findings.

Goal four: To support involvement with other organizations that promote services or advocacy efforts related to the disability community.

Travel costs for this goal will be covered in the following manner:

- Travel for SILC members will be covered through the SILC resource plan budget.
- Travel for CIL employees will be covered by the employing CIL.
- Travel for the DSU program manager will be paid from the Other SPIL Activities budget that supports DSU SILS activities.

Also, in some cases, the hosting agency may pay the travel costs or other funds may be available. Objective 1: Throughout the time period covered by this plan, maintain and support SILC or CIL representation (including reasonable expenses incurred for participation) with the following organizations that are involved with services and advocacy in the disability community:

- Montana Council on Developmental Disabilities
- Montana Association of the Blind
- Deaf Task Force
- Vocational Rehabilitation Council
- Montana Transportation Partnership
- Disability Action Alliance of Montana

Because many of the above organizations exert control over their membership, the commitment to be involved with the organizations does not apply if the organization chooses not to have a SILC or CIL representative.

This list is not all-inclusive and participation in other appropriate groups is likely to occur over the course of the plan.

Each year of the plan, representatives will provide a report on the activities of the organization during at least two meetings of the full SILC.

Objective 2: Each year of the plan, invite at least one presentation from appropriate groups that promote services or advocacy efforts. At least one presentation over the three year plan will be from an advocacy organization representing the elderly population.

Objective 3: Throughout the time period covered by the plan, maintain involvement on the national level with the following organizations:

Association of Programs for Rural Independent Living (APRIL)

National Council on Independent Living (NCIL)

SILC Congress

Maintaining involvement will include sending a minimum of one representative (of the SILC, a CIL director, or DSU program manager) to national meetings and obtaining reports from those representatives at SILC meetings.

Objective 4: In order to increase communication with Montana's elderly population and the agencies that serve them, the following activities will be carried out:

- The program manager will work to have an IL presentation accepted at the Governor's Conference on Aging during the time frame of the SPIL.
- The program manager will work to have an IL presentation accepted and broadcast on the public television series "Aging Horizons" during the time frame of the SPIL.

Goal five: To develop a statewide network to coordinate and address the local advocacy issues set by the 2006 Independent Living Symposium (note: The Symposium was a statewide conference that included the directors of all Montana CILs, staff from all Montana CILs, board members of some of Montana CILs, SILC members, and IL consumers.) The priority local advocacy issues identified in this collaboration were:

- Transportation – safe, reliable, affordable, accessible
- Housing /including the following:
 - affordable,
 - accessible,
 - integration,
 - home ownership opportunities for persons with disabilities, and
 - accommodations
- School transition
- Representation by people with disabilities – nothing about us without us – let the voice of persons with disabilities be heard at meetings/commissions
- Disaster relief planning /make local level follow state laws that are already in place
- Personal assistants background checks & public personal assistants registry

Objective 1: By December 1, 2007, the legislative/advocacy committee of the SILC will have identified a task force made up of consumers, SILC members, or CIL staff to address the priority issues for each CIL. Each CIL will establish task forces to address at least two of the priorities listed above.

Objective 2: By July 1, 2008, each of the task force will have formulated at least one goal with objectives related to addressing their assigned issue.

Objective 3: On an ongoing basis, the legislative/advocacy committee of the SILC will coordinate activities between the task forces. Coordination will include making quarterly reports to the SILC on the activities of the task forces and coordinating communication of task forces working on similar issues.

Goal six: To develop a statewide network to coordinate and address the statewide priority issues established at an interactive video conference held in August of 2007 (note: The interactive conference was a statewide conference with 77 participants that included the directors of all but one of Montana CILs, staff from all Montana CILs, board members of some of Montana CILs, SILC members, DSU staff and IL consumers.) The priority statewide issues identified in this collaboration, listed in the order of support each issue received, were:

- Implement a Medicaid Buy-in program that will allow people with disabilities to earn an amount beyond the medically needy level of \$595 and still be able to buy into the Medicaid program at a level based on income.
- Provide funding to expand Montana's network of Centers for Independent Living through the development of new branch offices or expansion of present branch offices.
- Ensure there is a disability history and culture curriculum in the schools. "Disability Education for All".
- Provide funding to equalize the core funding to Montana's Centers for Independent Living.
- Allocate sufficient funding and resources to provide living wages for all direct support professionals such as personal care assistants and benefits that are competitive with others in similar jobs.
- Prioritize the housing needs of persons below 50% of median income, particularly below 30%, and persons with disabilities across housing activity type-including both rental and single family homeownership.
- Funding for programs for youth with disabilities, particularly programs that support development of leadership skills and independent living philosophy and skills.
- Strengthen Local Transportation Advisory Committees (TAC's) through increased involvement of people with disabilities, senior citizens and other transportation users.
- Make all funding based on the values of self-determination by the person with disabilities.
- Develop a comprehensive Money Follows the Person plan.
- Equalize the Medicaid spend-down base to the SSI level and have it adjust yearly.
- Implement "nothing about us without us" in state government planning and decision making.
- Provide financial incentives to personal assistance provider agencies that provide health insurance to personal assistants.
- Improve transition services from high school to adult life.
- Support funding for training modules and other training opportunities that are relevant for direct care staff.

Objective 1: By October 1, 2007, the legislative/advocacy committee of the SPIL will have assigned each member of the committee responsibility for taking the lead on at least 2 of the preceding issues. Taking the lead will include:

- Identification of task force members
- Assigning a lead person for each task force
- Being the liaison between the task force and the committee, the SILC, and the CILs.
- Monitoring progress of the assigned task force and actively engaging the task force in problem solving when progress slows.
- Reporting to the SILC on task force progress to the SILC on a quarterly basis.

Objective 2: By October 15, 2007, the legislative/advocacy committee of the SPIL will have established task forces made up of consumers, SILC members and CIL staff for at least 12 of the above issues (The five issues that received the most support must be retained.) and the task forces will have identified the following:

- The aspects of each issue that are administrative in nature and the aspects that are

legislative in nature.

- If legislative funding is an element of the issue, then an estimate of the funding necessary or a plan on how to estimate the necessary funding.
- At least five strong talking points on the issue
- Identification of what other organizations might be willing to partner with IL to address the issue.

Objective 3: By January 1, 2008, each task force will have developed at least one goal with objectives related to a strategy for addressing the issue.

Objective 4: By July 1, 2009, each task force will have reviewed the impact of the recent legislature on their focus issue and readjusted strategies on their goal based on the legislature.

Objective 5: By September 1, 2009, the legislative/advocacy committee will coordinate a statewide community video or internet conference to review prioritizing issues impacting the disability community.

Objective 6: By October 1, 2009 the legislative/advocacy committee will readjust the task forces to address the new priorities.

1.2B Describe the steps planned regarding outreach to populations in the State that are unserved or underserved by programs under title VII, including minority groups and urban and rural populations. This section of the SPIL must:

– Identify the populations to be designated for targeted outreach efforts;

The populations identified as unserved/underserved in Montana are Native Americans with disabilities, youth with disabilities, and persons with disabilities considering employment.

Montana has seven Native American reservations and is in the process of establishing an eighth. Native Americans account for 5-6 percent of the state's population. Sixty percent of the state's Native American population resides on reservations. In past plans, the emphasis of the outreach efforts towards Native Americans has been meeting with Section 121 directors who manage programs on reservations. In this plan, there will be an additional initiative (Goal 2 Objective 6) to outreach to the urban Indian centers located in Montana in efforts to better reach the additional forty percent of Native Americans residing in Montana.

Youth (age 18-28) are recognized as an unserved/underserved population, and the SILC, CILs, and the DSU believe that it is important to outreach to youth in order to develop future Montana leaders. Also, the perspective of youth is different from the older population and the message and programs of IL need to be modified to relate to youth, particularly in the unique circumstances of transitioning from high school to the adult service system.

Efforts guided by past state plans have assisted in increasing the number of youth with disabilities and Native Americans with disabilities served by Montana's CILs. During the past few years, these populations were served at comparable percentages to those served in the

general disability population. In this plan, it is hoped that the comparable service level can be maintained or improved upon and that CILs can be assisted in identifying modifications to service delivery that will make services more appropriate to the different perspectives of the identified unserved/underserved populations.

For several years Montana's disability community has indicated a number of issues have impeded persons with disabilities who are considering employment. Key issues noted in this area are obtaining information on social security work incentives, retaining medical coverage after employment, and transportation. The SILC and CILs plan to address these issues in the upcoming three years through direct services and systems advocacy.

– Identify the geographic areas (i.e., communities) in which the targeted populations reside; and

For the Native American population there will be a focus to contact and work with the urban Indian Centers located in:

- Billings
- Butte
- Great Falls
- Helena
- Missoula

For the unserved/under served population of persons interested in employment the geographic areas that will be the focus will be communities with a Community Work Incentives Coordinator (CWICS) that have been trained by the Social Security Administration to provide work incentives benefits counseling. CWICS are located in the following communities:

- Billings
- Butte
- Bozeman
- Glasgow
- Glendive
- Great Falls
- Kalispell
- Missoula

For the unserved/underserved population of youth with disabilities, the following communities will be the focus of outreach:

- Poplar/Wolf Point
- Missoula
- Glendive
- Laurel
- Belgrade

- Describe how the needs of individuals with significant disabilities from minority group backgrounds will be addressed.

This is described in several objectives in Goal 2.

1.3 Financial Plan – 34 CFR 364.42(a)(2) and (3); 34 CFR 364.29

Describe in sections 1.3A and 1.3B, below, the financial plan for the use of Federal and non-Federal funds to meet the SPIL objectives.

1.3A Financial Plan Tables

Complete the financial plan tables covering years 1, 2 and 3 of this SPIL. For each funding source, provide estimated dollar amounts anticipated for the applicable uses. The financial plan table should include only those funding sources and amounts that are intended to support one or more of the objectives identified in section 1.2 of the SPIL. To the extent possible, the tables and narratives must reflect the applicable financial information from centers for independent living.

The following are funding projections and may vary throughout the course of the plan. If funding changes of more than 5% of a particular funding source are anticipated, it may require modification of the SPIL. Changes of less than 5% of a particular funding source are not anticipated as requiring a modification in the SPIL unless goals and objectives are significantly impacted.

Year 1

<u>Sources</u>	<u>Approximate Funding Amounts and Uses</u>			
	SILC Resource Plan	IL Services	General CIL Operations	Other SPIL Activities
Title VII Funds				
Chapter 1, Part B/match is listed under state funds	\$15,245	\$206,892	0	\$79,340
Chapter 1, Part C	0	0	\$784,879	0
Chapter 2, OIB (only those provided by the OIB grantee to further a SPIL objective)	0	0	0	0
Other Federal Funds				
Sec. 101(a)(18) of the Act (Innovation and Expansion)	\$9,415	0	0	0
Other (WIPA Grant)	0	\$100,000	0	0

Other (SS reimbursement)		\$20,000		
Non-Federal Funds				
State Funds - match	\$4,499	\$22,986	0	\$8,815
State Funds – general funds for IL services	0	\$336,593	0	0
Other	0	0	0	0

Year 2

<u>Sources</u>	<u>Approximate Funding Amounts and Uses</u>			
	SILC Resource Plan	IL Services	General CIL Operations	Other SPIL Activities
Title VII Funds				
Chapter 1, Part B	\$8,647	\$206,892	0	\$85,938
Chapter 1, Part C	0	0	\$784,879	0
Chapter 2, OIB (only those provided by the OIB grantee to further a SPIL objective)	0	0	0	0
Other Federal Funds				
Sec. 101(a)(18) of the Act (Innovation and Expansion)	\$9,415	0	0	0
Other (WIPA Grant)	0	\$100,000	0	0
Other (SS reimbursement)		\$20,000		
Non-Federal Funds				
State Funds - match	\$3,765	\$22,986	0	\$9,549
State Funds – general funds for	0	\$349,899	0	0

IL services				
Other	0	0	0	0

Year 3

Sources	Approximate Funding Amounts and Uses			
	SILC Resource Plan	IL Services	General CIL Operations	Other SPIL Activities,
Title VII Funds				
Chapter 1, Part B	\$6,344	\$206,892	0	\$88,241
Chapter 1, Part C	0	0	\$784,879	0
Chapter 2, OIB (only those provided by the OIB grantee to further a SPIL objective)	0	0	0	0
Other Federal Funds				
Sec. 101(a)(18) of the Act (Innovation and Expansion)	\$9,415	0	0	0
Other (WIPA grant)	0	\$100,000	0	0
Other (SS reimbursement)		\$20,000		
Non-Federal Funds				
State Funds - match	\$2,443	\$22,986	\$200,000	\$9,815
State Funds – general funds for IL services	0	349,899	0	00
Other	0	0	0	0

1.3B Financial Plan Narratives

1.3B(1) Specify how the part B, part C and chapter 2 (Older Blind) funds, if applicable, will further the SPIL objectives. How Part B and Part C dollars will be used.

For an explanation related to the procedures and roles of the SILC and program manager see Section 1.2A.

The following is a description of the funds that support each of the objectives.

The CILs' goals incorporated into this SPIL are supported through the contracts for services from Part B, including match, listed under IL Services; the contracts for services from the state general fund listed under IL services; and Part C funds listed under General CIL Operations. The goals

supported by Part B and General Fund dollars are those where it has been noted that a SILS goal has incorporated a CIL goal at least partially into a SILS goal. Part C funds are the primary funding source for supporting the operation of CILs and CILs goals.

Goal one: To provide independent living (IL) services to as many people as possible in Montana.

Objective 1: During each year of the plan, at least 200 new consumers will be found eligible and have services initiated by Montana's network of CILs.

This objective is primarily supported by the Part B (including match) funds and state general funds listed under IL Services.

Objective 2: During each year of the plan, at least fourteen activities that involve local advocacy to improve the lives of persons with disabilities in areas such as housing, transportation, accessibility, and youth transition will be carried out by Montana's network of CILs with SILC members being involved in at least half of the advocacy activities.

Examples include: advocating for increasing the accessible units in local housing programs; recruiting and orienting persons with disabilities to serve on local transportation advisory committees; and developing, coordinating, and promoting a local care giver conference.

This objective is primarily supported by the Part B (including match) funds and state general funds listed under IL Services.

Objective 3: Each year of the plan, in order to monitor the provision of services, the DSU program manager will conduct a site visit to review case records, conduct interviews, and other activities necessary to assess the service delivery system of two CILs. As part of the evaluation of this goal a SILC representative will accompany the program manager on the site visit. Within thirty days following the site visit, a written report will be developed and delivered to the CIL director, with a copy to be delivered to the CIL board. A verbal report will be provided to the full SILC at the SILC meeting following the site visit.

This objective is primarily supported by the Part B (including match) funds listed under Other SPIL Activities. These funds provide the salary of the program manager and the position's travel. The Part B (including match) funds listed under SILC Resource Plan support the transportation and other expenses that support the SILC representative.

Objective 4: Each year of the plan, the DSU will provide the administrative support necessary to compile the contracts to provide services through the CILs. As part of the evaluation of this goal, committee of the SILC will review and provide input on the contracts.

This objective is primarily supported by the Part B (including match) funds listed under Other SPIL Activities. These funds provide the salary of the program manager and other DSU personnel involved with the contract responsibilities.

Objective 5: During each year of the grant, the DSU program manager will consult with CIL directors and SILC members to gather information to draft a report for the Governor that will also be distributed to state legislators. The draft will be reviewed by the SILC chair and revised as necessary prior to final distribution.

This objective is primarily supported by the Part B (including match) funds listed under Other SPIL Activities. These funds provide the salary of the program manager.

Goal two: To provide outreach to unserved and underserved populations in Montana to gain a better understanding of how to provide appropriate services to populations designated as unserved and underserved.

Objective 1: Within the first year of the plan, the SILC will invite a representative of the Little Shell tribe to attend a SILC meeting to discuss outreaching with this newly emerging landless tribe in order to increase the awareness of the availability of IL services.

This objective is supported by the Part B (including match) funds listed under Other SPIL Activities. These funds provide the salary of the program manager who makes meeting arrangements. Also, the meeting funds provided under Title I listed in the SILC Resource Plan support the costs of meetings, including travel costs for presenters if necessary.

Objective 2: Each year of the plan, each of the CILs under contract with the DSU will conduct at least one systems change activity (see explanation of systems change and examples in goal 1 objective 2) that supports an independent living issue developed by a group of consumers from one of the designated unserved/underserved populations.

This objective is primarily supported by the Part B (including match) funds and state general funds listed under IL Services.

Objective 3: Each year of the plan, the SILC will invite representatives from one of the identified unserved/underserved populations to present at a SILC meeting to provide guidance on methods of adapting the four core services to better serve that population.

This objective is supported by the Part B (including match) funds listed under Other SPIL Activities. These funds provide the salary of the program manager who makes meeting arrangements. Also, the meeting funds provided under Title I listed in the SILC Resource Plan support the costs of meetings, including travel costs for presenters if necessary.

Objective 4: Before the end of the first year of this plan, the CIL directors will meet with a staff person of the urban Indian centers located in their service area regarding outreach to appropriate consumers served by the urban Indian centers. The CIL directors will report on the outcomes of these meetings by the end of the first plan year. If it is not possible to arrange a meeting with staff of the urban Indian centers, the CIL directors will present evidence of their efforts.

This objective is primarily supported by the Part B (including match) funds and state general funds listed under IL Services.

Objective 5: Before the end of the first year of this plan, the CIL directors will meet with a staff person of the Section 121 projects located in their service areas regarding outreach to appropriate consumers served by the 121 projects. The CIL directors will report on the outcomes of these meetings by the end of the first plan year. If it is not possible to arrange a meeting with staff of the Section 121 projects, the CIL directors will present evidence of their efforts.

This objective is primarily supported by the Part B (including match) funds and state general funds listed under IL Services.

Objective 6: Each year of the plan, at a SILC meeting, the CIL directors will present the initiatives they have carried out that year to out reach to the identified unserved/underserved populations groups and provide data and other evidence of the outcomes of those efforts. This objective is primarily supported by the Part B (including match) funds and state general funds listed under IL Services.

Objective 7: Throughout the plan, the SILC will maintain a youth member (age 18-28) on the SILC. If the youth member ages out and continues on the SILC, another member meeting the age criteria will be recruited when a vacancy occurs.

This objective is primarily supported by funds to support SILC meetings provided under Title I listed in the SILC Resource Plan support the costs of meetings. The Part B funds (including match) listed under the SILC Resource Plan also support activities of the youth member to be involved with committees and obtain training.

Objective 8: Throughout the plan, the SILC will have an active unserved/underserved committee that meets at least three times per year and provides guidance to the SILC on unserved/underserved populations, including evaluation of the efforts to outreach to the unserved/underserved populations.

This objective is primarily supported by the Part B funds (including match) listed under the SILC Resource Plan. These funds support the activities of committees.

Objective 9: Throughout the plan, there will be a director of 121 projects on the SILC and that member will be the chair of the unserved/underserved committee.

This objective is primarily supported by the Part B funds (including match) listed under the SILC Resource Plan. These funds support the activities of committees.

Objective 10: : In order to meet the cross-disability responsibility of IL, the SILC will have one disability specific presentation at a SILC meeting each year of this plan to keep current with needs and initiatives of specific disabilities.

This objective is primarily supported by Part B funds (including match) listed under Other SPIL Activities that provide the salary of the program manager who makes meeting arrangements. Also, the meeting funds provided under Title I listed in the SILC Resource Plan support the costs of meetings, including travel costs for presenters if necessary.

Goal three: To support a statewide network of CILs.

Objective 1: At least every four years, an AUP review of financial procedures will be arranged by the DSU at each Center to assist the CILs in developing effective financial procedures.

This objective is supported by Part B funds (including match) listed in the Other SPIL Activities. The funds support the costs of the program manager and other DSU personnel involved in the activities related to the objective as well as the indirect costs which support the services of the state auditors that perform the AUP.

Objective 2: Each year of the plan, by January 1, the DSU will coordinate and report on a consumer satisfaction survey of CIL consumers. A report on the analysis of the results will be presented to the SILC at the SILC meeting following the completion of the analysis. The report

for each CIL will be presented to the director of the CIL within a week of completion of the report.

This objective is primarily supported by the Part B (including match) funds listed under Other SPIL Activities. These funds provide the salary of the program manager.

Objective 3: Objective 3: By October 1, 2008, in order to explore increasing CILs' fee for service income obtained from VR for services provided to VR consumers as part of their employment plan, the DSU program manager will research fee for service arrangements and levels between CILs and rehabilitation services in other states and develop a report on the topic to present to the DSU administrator and CIL directors by March 1, 2009.

If the research reveals potential practices for increasing the fee for services paid by the Montana Rehabilitation Services Program to Montana CILs, a work group consisting of Rehabilitation Services personnel (including at least one regional administrator, one field staff, and one central office administrator) and IL representatives (including at least one CIL Director and two SILC members) will be formed by July 1, 2009. The work group will review potentially useful practices identified in the research. Where there is consensus that similar practices could work in Montana, an implementation plan may be developed. The work group will complete their review and plan development by March 1, 2010.

The DSU program manager will monitor implementation of the plan and carry out any evaluation activities the work group develops for two years following plan implementation. The program manager will submit quarterly reports on the monitoring findings and evaluation findings. This objective is primarily supported by the Part B (including match) funds listed under Other SPIL Activities. These funds provide the salary of the program manager. Costs related to CIL director participation will be supported by the Part C funds listed under General CIL Operation.

Goal four: To support involvement with other organizations that promote services or advocacy efforts related to the disability community.

Objective 1: Throughout the time period covered by this plan, maintain and support SILC or CIL representation (including reasonable expenses incurred for participation) with the following organizations that are involved with services and advocacy in the disability community:

- Montana Council on Developmental Disabilities
- Montana Association of the Blind
- Deaf Task Force
- Vocational Rehabilitation Council
- Montana Transportation Partnership
- Disability Action Alliance of Montana

Because many of the above organizations exert control over their membership, the commitment to be involved with the organizations does not apply if the organization chooses not to have a SILC or CIL representative.

This list is not all-inclusive and participation in other appropriate groups are likely to occur over the course of the plan.

Each year of the plan, representatives will provide a report on the activities of the organization during at least two meetings of the full SILC.

This objective is primarily supported by Part B funds (including match) listed in the SILC Resource Plan (for SILC member participation), in the Other SPIL Activities (for program manager participation) or Part C funds listed under General CIL Operation (to support CIL staff).

Objective 2: Each year of the plan, invite at least one presentation from appropriate groups that promote services or advocacy efforts. At least one presentation over the three year plan will be from an advocacy organization representing the elderly population.

This objective is primarily supported by the Part B funds (including match) listed under the SILC Resource Plan. These funds support the activities of committees.

Objective 3: Throughout the time period covered by the plan, maintain involvement on the national level with the following organizations:

Association of Programs for Rural Independent Living (APRIL)

National Council on Independent Living (NCIL)

SILC Congress

Maintaining involvement will include sending a minimum of one representative (of the SILC, a CIL director, or DSU program manager) to national meetings and obtaining reports from those representatives at SILC meetings.

This objective is primarily supported by Part B funds (including match) listed in the SILC Resource Plan (for SILC member participation), in the Other SPIL Activities (for program manager participation) or Part C funds listed under General CIL Operation (to support CIL staff).

Objective 4: In order to increase communication with Montana's elderly population and the agencies that serve them, the following activities will be carried out:

- The program manager will work to have an IL presentation accepted at the Governor's Conference on Aging during the time frame of the SPIL.
- The program manager will work to have an IL presentation accepted and broadcast on the public television series "Aging Horizons" during the time frame of the SPIL.

This objective is primarily supported by Part B funds (including match) listed in SILC Other Resources in order to cover time of the program manager for making arrangements for the broadcast. Travel expenses related to the presentation and other personnel costs will be covered by Part C funds for the CIL personnel or Part B SILC resource plan for SILC members.

Goal five: To develop a statewide network to coordinate and address the local advocacy issues set by the 2006 Independent Living Symposium (note: The Symposium was a statewide conference that included the directors of all Montana CILs, staff from all Montana CILs, board members of some of Montana CILs, SILC members, and IL consumers.) The priority local advocacy issues identified in this collaboration were:

- Transportation – safe, reliable, affordable, accessible
- Housing /including the following:
 - affordable,
 - accessible,
 - integration,
 - home ownership opportunities for persons with disabilities, and
 - accommodations

- School transition
- Representation by people with disabilities – nothing about us without us – let the voice of persons with disabilities be heard at meetings/commissions
- Disaster relief planning /make local level follow state laws that are already in place
- Personal assistants background checks & public personal assistants registry.

Objective 1: By December 1, 2007, the legislative/advocacy committee of the SILC will have identified a task force made up of consumers, SILC members, or CIL staff to address the priority issues for each CIL. Each CIL will establish task forces to address at least two of the priorities listed above.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. If travel is required by SILC members then the expense will be covered under SILC resource plan Travel. Time for the program manager in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Objective 2: By July 1, 2008, each of the task force will have formulated at least one goal with objectives related to addressing their assigned issue.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. Time for the program manager in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Objective 3: On an ongoing basis, the legislative/advocacy committee of the SILC will coordinate activities between the task forces. Coordination will include making quarterly reports to the SILC on the activities of the task forces and coordinating communication of task forces working on similar issues.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. Time for the program manager in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Goal six: To develop a statewide network to coordinate and address the statewide priority issues established at an interactive video conference held in August of 2007 (note: The interactive conference was a statewide conference with 77 participants that included the directors of all but one of Montana CILs, staff from all Montana CILs, board members of some of Montana CILs, SILC members, DSU staff and IL consumers.) The priority statewide issues identified in this collaboration, listed in the order of support each issue received, were:

- Implement a Medicaid Buy-in program that will allow people with disabilities to earn an amount beyond the medically needy level of \$595 and still be able to buy into the Medicaid program at a level based on income.
- Provide funding to expand Montana's network of Centers for Independent Living through the development of new branch offices or expansion of present branch offices.

- Ensure there is a disability history and culture curriculum in the schools. “Disability Education for All”.
- Provide funding to equalize the core funding to Montana’s Centers for Independent Living.
- Allocate sufficient funding and resources to provide living wages for all direct support professionals such as personal care assistants and benefits that are competitive with others in similar jobs.
- Prioritize the housing needs of persons below 50% of median income, particularly below 30%, and persons with disabilities across housing activity type-including both rental and single family homeownership.
- Funding for programs for youth with disabilities, particularly programs that support development of leadership skills and independent living philosophy and skills.
- Strengthen Local Transportation Advisory Committees (TAC’s) through increased involvement of people with disabilities, senior citizens and other transportation users.
- Make all funding based on the values of self-determination by the person with disabilities.
- Develop a comprehensive Money Follows the Person plan.
- Equalize the Medicaid spend-down base to the SSI level and have it adjust yearly.
- Implement “nothing about us without us” in state government planning and decision making.
- Provide financial incentives to personal assistance provider agencies that provide health insurance to personal assistants.
- Improve transition services from high school to adult life.
- Support funding for training modules and other training opportunities that are relevant for direct care staff.

Objective 1: By October 1, 2007, the legislative/advocacy committee of the SPIL will have assigned each member of the committee responsibility for taking the lead on at least 2 of the preceding issues. Taking the lead will include:

- Identification of task force members
- Assigning a lead person for each task force
- Being the liaison between the task force and the committee, the SILC, and the CILs.
- Monitoring progress of the assigned task force and actively engaging the task force in problem solving when progress slows.
- Reporting to the SILC on task force progress to the SILC on a quarterly basis.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. If travel is required by SILC members then the expense will be covered under SILC resource plan Travel. Time for the program manager in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Objective 2: By October 15, 2007, the legislative/advocacy committee of the SPIL will have established task forces made up of consumers, SILC members and CIL staff for at least 12 of the above issues (The five issues that received the most support must be retained.) and the task

forces will have identified the following:

- The aspects of each issue that are administrative in nature and the aspects that are legislative in nature.
- If legislative funding is an element of the issue, then an estimate of the funding necessary or a plan on how to estimate the necessary funding.
- At least five strong talking points on the issue
- Identification of what other organizations might be willing to partner with IL to address the issue.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. Time for the program manager in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Objective 3: By January 1, 2008, each task force will have developed at least one goal with objectives related to a strategy for addressing the issue.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. Time for the program manager in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Objective 4: By July 1, 2009, each task force will have reviewed the impact of the recent legislature on their focus issue and readjusted strategies on their goal based on the legislature.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. Time for the program manager in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Objective 5: By September 1, 2009, the legislative/advocacy committee will coordinate a statewide community video or internet conference to review prioritizing issues impacting the disability community.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. Time for the program manager time in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

Objective 6: By October 1, 2009 the legislative/advocacy committee will readjust the task forces to address the new priorities.

Costs related to CIL director and other CIL staff participation will be supported by the Part C funds listed under General CIL Operation. Participation by SILC members through conference calls will be covered up SILC resource plan under communication. Time for the program

manager time in carrying out assigned tasks will be covered under the SILC other resources section of the budget.

1.3B(2) Describe efforts to coordinate Federal and State funding for centers and IL services, including the amounts, sources and purposes of the funding to be coordinated.

During allocation of state funding, issues such as imbalance of federal funding and unserved/underserved populations in the service areas are taken into consideration in order try to equalize accessibility to IL services throughout Montana. This method has led to near equal funding levels from the core funding sources for CILs in Montana.

The following estimated projections are made for the Centers for Part B, Part C and State IL General Funds, actual distribution may vary as described previously in this plan (Section 1.3 A).

Year/Cen	2008			2009			2010		
	Part B	St Gen Funds	Part C	Part B	St Gen Funds	Part C	Part B	St Gen Funds	Part C
LIFTT	\$91,951	\$153,150	\$90,180	\$91,951	\$153,150	\$90,180	\$91,951	\$153,150	\$90,180
MILP	\$22,988	\$30,293	\$260,462	\$22,988	\$43,599	\$260,462	\$22,988	\$43,599	\$260,462
NCILS	\$91,951	\$153,150	\$101,190	\$91,951	\$153,150	\$101,190	\$91,951	\$153,150	\$101,190
Summit	\$22,988	\$0	\$333,047	\$22,988	0	\$333,047	\$22,988	\$0	\$333,047

Part C funds are directly granted by RSA to all four Montana IL Centers. The state unit does not have the required funds to participate in the matching mechanism detailed in the statute; therefore, Part C grants are made directly to the CILs. Summit and MILP receive the majority of the available Part C funds available to Montana.

1.3B(3) Describe any in-kind resources including plant, equipment or services to be provided in support of the SILC resource plan, IL services, general CIL operations and/or other SPIL objectives.

For an explanation related to the procedures and roles of the SILC and program manager see Section 1.2A.

Office space, office supplies, access to major office equipment (copier, fax, scanner, laptop computer, projector, etc), and access to DSU training funds are made available as in-kind contributions to support the program manager when carrying out activities to support the SILC and SPIL activities

1.3B(4) Provide any additional information about the financial plan, as appropriate.

Should additional funding for IL services become available during the course of the plan, the first priority would be to equalize funding between the CILs in the three core funding areas. The second priority would be to restore funding to the SILC resource plan to support a symposium and other legislative activities. The third priority would be providing all areas cost of living increases. If funds received have earmarked purposes, the funds will be used for the designated purposes and not distributed per the preceding priorities.

1.4 Compatibility with Chapter 1 of Title VII and the CIL Work Plans – 34 CFR 364.42(c) and (e)

1.4A Describe how the SPIL objectives are consistent with and further the purpose of

chapter 1 of title VII of the Act as stated in section 701 of the Act and 34 CFR 364.2.

The purpose of Chapter 1 of Title VII is to promote a philosophy of independent living, including a philosophy of consumer control, peer support, self-help, self-determination, equal access, and individual and system advocacy, in order to maximize the leadership, empowerment, independence, and productivity of individuals with disabilities, and the integration and full inclusion of individuals with disabilities into the mainstream of American society. Goal one of this plan supports maximizing the independent living services in Montana. During the service delivery system, consumers are exposed to the philosophies of independent living and a major part of the service delivery is learning that the consumer needs to be self empowered to get the support needed to achieve their goals. Also, the systems advocacy activities carried out in Goal one focus on implementing integration and inclusion of individuals with disabilities in mainstream of society. Goals five and six focus on strategizing to overcome obstacles to the integration and inclusion of individuals with disabilities on the state and local level. The issues were all identified by groups that were almost wholly persons with disability, which incorporates the philosophy of self determination. Leadership of the groups that are developing strategies to address the issue are all persons with disabilities. The end outcome of Goals five and six is that through addressing issues persons with disabilities will be empowered and will reduce barriers to persons with disabilities in Montana and consequently increase the independence and productivity of Montanans with disabilities.

1.4B Describe how, in developing the SPIL objectives, the DSU and the SILC considered and incorporated, where appropriate, the priorities and objectives established by centers for independent living under section 725(c)(4) of the Act.

The SILC incorporated a number of the CIL goals into SILS goals and those instances are noted in the goal section. The primary conduit for this incorporation was having a CIL director that was a member of the SPIL writing team who assisted with writing SILS goals. This representative met with the other directors on a periodic basis and represented the views of the other directors as well as his own on the committee. Also, at many meetings other CIL directors attended the meeting and spoke out on goals and other issues. Also, in two of the primary overarching goals (goals 5 and 6), CIL directors and many CIL staff attended the sessions that picked the areas that would be priorities for work on statewide and a local basis. This is reflected in the fact that priorities that are mentioned in CIL goals such as housing, transportation and youth transition became priority areas in SILS goals 5 and 6.

1.5 Cooperation, Coordination, and Working Relationships Among Various Entities – 34 CFR 364.26

Describe the steps that will be taken to maximize the cooperation, coordination and working relationships among the SILS program, the SILC, and centers; the DSU, other State agencies represented on the SILC and other councils that address the needs of specific disability populations and issues; and other public and private entities determined to be appropriate by the SILC.

- **The description must identify the entities with which the DSU and the SILC will cooperate and coordinate.**

- The SILC members are encouraged to visit CILs.
- Information on CILs in general and from each CIL is provided as part of the orientation process for new SILC members and is available to all SILC members.
- While one CIL director is a member of the SILC, all CIL directors are invited to all general SILC meetings.
- All CIL directors are involved in at least one committee of the SILC.
- The DSU IL program manager visits each CIL at least once a year.
- The DSU IL program manager is willing to attend CIL director meetings when invited.
- The CILs, SILC, and DSU program manager will all be involved with planning for the IL legislative symposium and legislative day, if funding is found for these activities.
- As stated in the objectives, the DSU agrees to discuss the potential for fee for services in areas that are appropriate to the development of individual employment plans for consumers involved with the state vocational rehabilitation program.
- The DSU, with SILC input, contracts with CILs to provide IL services.
- The DSU ex-officio member on the SILC is Peggy Williams. Peggy also staffs the state VR council and this assists with coordination of the SILC with that council and VR.
- The SILC representative on the VR council is Carol Lambert, SILC chair. Having the chair of the SILC sit on the VR allows for a direct conduit of VR issues into the SILC leadership.
- The current DSU ex-officio member of a non DSU state agency is Nicola Smith who until recently was an adult protective services worker within the Senior and Long Term Care Division of the Department of Public Health and Human Services. Nicola has recently taken another job in the private sector and no longer meets the qualification of the ex-officio member. The SILC nominations committee is in the process of contacting two potential replacements for this position. One person works for the State Auditors Office and the second person works for Senior and Long Term Care. The Governor requests that two names are submitted for each vacancy. Should the current recruitment efforts produce positive results, it is hoped that two applications can be submitted to the Governor and an appointment made within the next few months.

Also, as described in Goal 5, SILC members, CIL directors, and DSU staff are encouraged to participate in councils and organizations that are involved with disability issues. At each SILC meeting, those present are allowed time to discuss activities of other groups they are involved with. If the reports present possibilities for collaboration, often plans on how to pursue collaboration are developed and carried out.

Specific entities the DSU and the SILC cooperate and coordinate with are:

- Montana Council on Developmental Disabilities
- Montana Association of the Blind
- Deaf Task Force
- Vocational Rehabilitation Council

- Montana Transportation Partnership
- Disability Action Alliance of Montana

The list is not inclusive and changes, but is representative of current involvement

1.6 Coordination of Services – 34 CFR 364.27

Describe how IL services funded under chapter 1 of title VII of the Act will be coordinated with and complement other services to avoid unnecessary duplication with other Federal, State, and local programs, including the OIB program authorized by chapter 2 of title VII of the Act, that provide IL- or VR-related services.

The CIL directors, SILC members, and DSU staff are actively involved with a number of disability organizations and coalitions of organizations, and through these contacts the IL network becomes aware of services provided through other agencies. Reports at the SILC meetings become a forum for sharing issues related to duplication of services and developing opportunities to develop approaches that complement services within the network through cooperation and collaboration. Specific connections with other networks that create communication channels are:

- The chair of the SILC is a member on the Montana Council on Developmental Disabilities.
- The chair also sits on the state VR Council and one of the members of that Council is a staff of Special Education section of the Office of Public Instruction and there is significant opportunity to obtain information on Special Education through the interaction on this council.
- The program manager's office is housed in the Department of Public Health and Human Services and is on the primary email distribution lists for sharing information within the Department. When information of significance to services provided by the CILs comes through the system, the program manager forwards the information to the CILs and the SILC. The program manager uses his position within the Department as a liaison for the CILs upon request by the CILs or SILC.
- One of the CIL directors is on the board of the Montana Home Choice Coalition. This organization's mission is to create better community housing choices for all people with disabilities by working through a coalition of Montana citizens, advocates, providers, federal state, and local agencies, the housing finance community, realtors, and the home-building industry.
- One of the CILs has a staff person who is President of the local Community Housing Resource Board.
- A staff member and one of the SILC members sit on local advisory councils of local mental health service authority organizations, which assist in the management of regional public mental health care.
- One CIL is the recipient of a WIPA contract through the Social Security Administration and gets regular updates on programs authorized under titles XVIII through XX of the Social Security Act. That CIL shares significant issues that come through this communication with other CILs and the SILC.
- A SILC representative and a CIL director representative sit on the Montana Transportation Partnership. The mission of the partnership is to ensure Montanans, in their community of choice, have accessible, safe, affordable, and reliable transportation services through the

development of coordinated systems. A variety of members are on the Partnership, including the Montana Department of Transportation, which receives the federal funds for transportation coming into Montana.

- At one CIL, A Veteran's Affairs (VA) paid person works at one of the CILs and helps to interface with the veteran's services in the area.
- A SILC member works as a volunteer member of the Vision Impairment Service Team at a veteran's medical service center and this assists in staying current with VA policies. Also, a major portion of his role is referring veterans to other local services and by keeping current on the local programs; it assists with coordination with the VA services.
- Coordination with the OIB is described in the following section.

1.7 Independent Living Services for Individuals who are Older Blind – 34 CFR 364.28

Describe how the DSU seeks to incorporate into, and describe in, the State plan any new methods or approaches for the provision of IL services to older individuals who are blind that are developed under the Older Individuals who are Blind program and that the DSU determines to be effective.

The DSU considers input from the SILC important on issues involving the state plan. Therefore, the SILC will have a presentation by the Program Administrator of the Older Individuals who are Blind Program for consideration of incorporating into, and describing in, the State plan any new methods or approaches for the provision of IL services to older individuals who are blind. The presentation will occur during the second year of the new plan in order to allow the opportunity to incorporate ideas into the 2011-2013 plan.

Section 2: Scope, Extent, and Arrangements of Services

2.1 Scope and Extent – 34 CFR 364.42(b)(2)(3); 34 CFR 364.43(b); 34 CFR 364.59(b)

2.1A Check the appropriate boxes in the SPIL Instrument table indicating the types of IL services to be provided to meet the objectives identified in section 1.2 of this SPIL, and whether the services will be provided by the CILs or by the DSU (directly and/or through contract or grant).

Table 2.1A: Independent living services	Provided by the DSU (directly)	Provided by the DSU (through contract and/or grant)	Provided by the CILs (Not through DSU contracts/ grants)
Core Independent Living Services, as follows:			
- Information and referral		X	X
- IL skills training		X	X
- Peer counseling		X	X
- Individual and systems advocacy		X	X
Counseling services, including psychological, psychotherapeutic, and related services		X	X

Table 2.1A: Independent living services	Provided by the DSU (directly)	Provided by the DSU (through contract and/or grant)	Provided by the CILs (Not through DSU contracts/ grants)
Services related to securing housing or shelter, including services related to community group living, and supportive of the purposes of this Act and of the titles of this Act, and adaptive housing services (including appropriate accommodations to and modifications of any space used to serve, or occupied by, individuals with significant disabilities)		X	X
Rehabilitation technology		X	X
Mobility training		X	X
Services and training for individuals with cognitive and sensory disabilities, including life skills training, and interpreter and reader services		X	X
Personal assistance services, including attendant care and the training of personnel providing such services		X	X
Surveys, directories and other activities to identify appropriate housing, recreation, accessible transportation and other support services		X	X
Consumer information programs on rehabilitation and IL services available under this Act, especially for minorities and other individuals with disabilities who have traditionally been unserved or underserved by programs under this Act		X	X
Education and training necessary for living in the community and participating in community activities		X	X
Supported living		X	X
Transportation, including referral and assistance for such transportation		X	X
Physical rehabilitation		X	X
Therapeutic treatment		X	X
Provision of needed prostheses and other appliances and devices		X	X
Individual and group social and recreational services		X	X

Table 2.1A: Independent living services	Provided by the DSU (directly)	Provided by the DSU (through contract and/or grant)	Provided by the CILs (Not through DSU contracts/ grants)
Training to develop skills specifically designed for youths who are individuals with significant disabilities to promote self-awareness and esteem, develop advocacy and self-empowerment skills, and explore career options		X	X
Services for children with significant disabilities		X	X
Services under other Federal, State, or local programs designed to provide resources, training, counseling, or other assistance of substantial benefit in enhancing the independence, productivity, and quality of life of individuals with significant disabilities		X	X
Appropriate preventive services to decrease the need of individuals with significant disabilities for similar services in the future		X	X
Community awareness programs to enhance the understanding and integration into society of individuals with disabilities		X	X
Other necessary services not inconsistent with the Act		X	X

2.1B Describe any service provision priorities, including types of services or populations, established for meeting the SPIL objectives identified in section 1.2.

Because funding for IL services in Montana is inadequate to provide the same level of quality services across the full scope of IL services listed above, Montana prioritizes the support and strengthening of the four core IL services. The development of strong personal advocacy skills and a strong advocacy network for disability issues is particularly emphasized. Other services are available and provided, but the core services are prioritized. In addition, there is an emphasis in outreaching to the unserved/underserved populations described in 1.2 B.

2.1C If the State allows service providers to charge consumers for the cost of services or to consider the ability of individual consumers to pay for the cost of IL services, specify the types of IL services for which costs may be charged and for which a financial need test may be applied, and describe how the State will ensure that:

- Any consideration of financial need is applied uniformly so that all individuals who are eligible for IL services are treated equally; and
- Written policies and consumer documentation required by 34 CFR 364.59(d) will be kept by the service provider.

Montana allows service providers to charge consumers for the cost of services and to consider the ability of individual consumers to pay for the cost of IL services. However, it does not

require them to do so and at this time no CILs require a financial need test for the provision of services. Should a CIL indicate that they will be charging consumers for services, they will be required to provide attachments with the following documentation:

- Procedures in place to ensure that any consideration of financial need is applied uniformly so that all individuals who are eligible for IL services are treated equally; and
- Written policies and consumer documentation required by 34 CFR 364.59(d) will be kept by the service provider.

During site reviews the service providers that have indicated that they plan to charge consumers will have records reviewed related to compliance with the above requirements.

2.2 Arrangements for State-Provided Services – 34 CFR 364.43(d) and (e)

2.2A If the DSU will provide any of the IL services identified in section 2.1A through grants or contractual arrangements with third parties, describe such arrangements.

Montana provides services to individuals with disabilities through contracts for Part B funds and targeted general funds. Contracts are developed to ensure that federal requirements related to the operation of CILs and providing IL services to consumers are agreed to by the CILs. The contracts are also reviewed by SILC members prior to completion of the contracts. In order to monitor for compliance with the terms of the contract, the DSU program manager and a SILC representative conduct periodic site reviews and auditors from the Department of Public Health and Human Services conduct periodic reviews that involve reviewing the financial procedures of the CILs.

2.2B If the State contracts with or awards a grant to a center for the general operation of the center, describe how the State will ensure that the determination of an individual's eligibility for services from that center shall be delegated to the center.

The CILs determine consumer eligibility. Language that reflects federal requirements for eligibility are included in the contracts and the determination that the CILs are determining eligibility based on the guidelines is reviewed in site visits described in SILS goal one objective three.

Section 3: Design for the Statewide Network of Centers

3.1 Existing Network – 34 CFR 364.25

Provide an overview of the existing network of centers, including non-Part C-funded centers that comply with the standards and assurances in section 725 (b) and (c) of the Act, and the geographic areas and populations currently served by the centers.

The existing network of CILs consists of four CILs and eleven branch offices (an increase of four branch offices since the last plan). All of the CILs receive a mix of Part B (through contract) and Part C funds. Three of the CILs (NCILS, MILP, and LIFTT) also receive state general fund contracts. Estimated distributions of state funds for Part B and General Funds are included in section 1.3B.

Below is a map of Montana indicating the areas served by the four CILs.

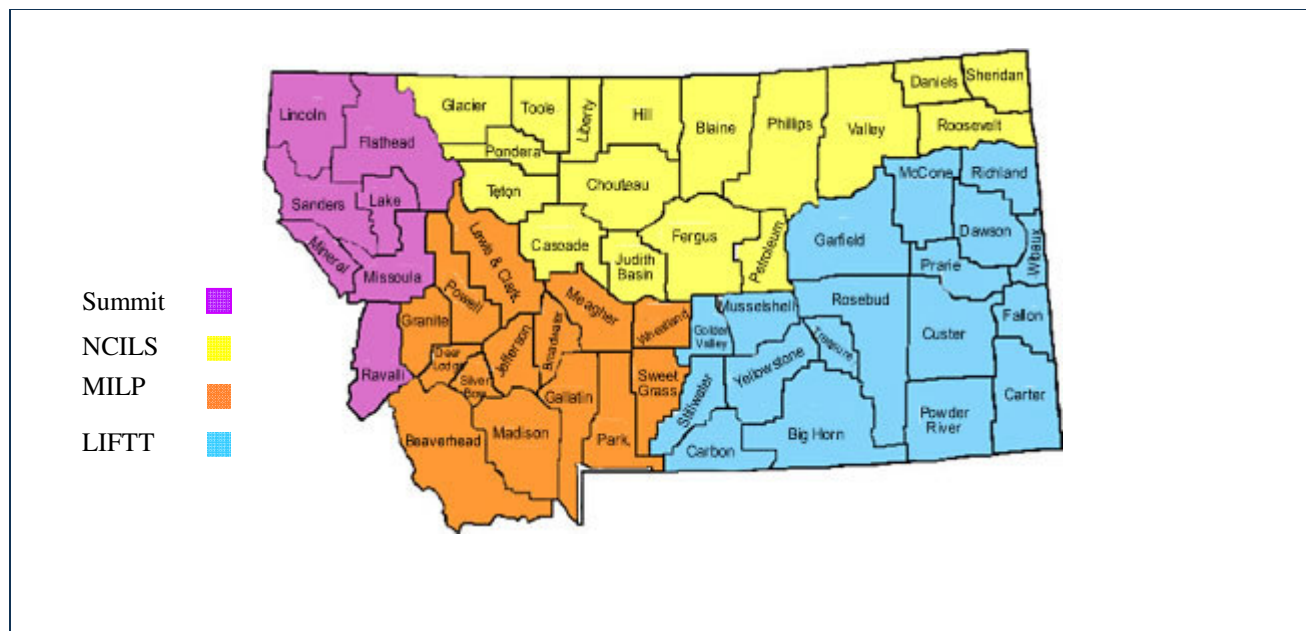


Figure One: CIL REGIONS

Summit's main office is in Missoula with branch offices in Hamilton, Kalispell, and Ronan (on the Flathead Reservation.) NCILS' main office is in Black Eagle (Great Falls) with branch offices in Glasgow, Poplar (on the Fort Peck Reservation.), and a statewide branch with an office in Helena that facilitates the Montana Youth Leadership Forum. MILP's main office is in Helena with branch offices in Butte and Bozeman. LIFTT's main office is in Billings with branch offices in Glendive, Miles City, and Ashland (on the Northern Cheyenne Reservation.) The CILs' goals for expansion are noted in the next section.

3.2 Expansion of Network – 34 CFR 364.25

Describe the design for the further expansion of the network, including identification of the unserved and underserved areas in the State and the order of priority for serving these areas as additional funding becomes available (beyond the required cost-of-living increase).

NCIL's goal 7 is to conduct activities to increase the number of people served who are members of populations that are currently unserved or underserved. MILP's goal 4 is to conduct outreach activities to Hutterite colonies in MILP's service area. Summit's goal 7 is to conduct outreach activities to Native Americans, youth with disabilities, senior citizens, people who are deaf, and people living in rural areas of western Montana. LIFTT's goal 5 is to apply for Community Development Block Grant funds for Billings to continue building ramps in the community. In the other communities, LIFTT will continue to look for funds to build ramps.

3.3 Section 723 States Only – 34 CFR 364.39

Montana is not a 723 state.

3.3A If the State follows an order of priorities for allocating funds among centers within a State that is different from what is outlined in 34 CFR 366.22, describe the alternate order

of priority that the DSU director and the SILC chair have agreed upon. Indicate N/A if not applicable.

3.3B Describe how the State policies, practices and procedures governing the awarding of grants to centers and the oversight of these centers are consistent with 34 CFR 366.37 and 366.38.

Section 4: Designated State Unit (DSU)

4.1 Administrative Support Services – 34 CFR 364.4; 34 CFR 364.22(b)

4.1A Describe the administrative support services to be provided by the DSU for the SILS (Part B) program and, if the State is a Section 723 State, for the CIL (Part C) program.

For an explanation related to the procedures and roles of the SILC and program manager see Section 1.2A.

Administrative staff support for the SILC is provided by designated state unit with Title VII Part B funds (including match). The staff support position is responsible for providing staffing activities to the SILC, which include coordination and hosting meetings; support of SILC committees; assisting with management and execution of the SPIL; document development; and to serve as liaison to the SILC and DSU and CILs. The IL program manager is the primary staff person involved with providing the above support; however other DSU staff provide support based on need and expertise.

- The DSU program manger is assigned to assist the SILC in implementation of the SPIL.
- DSU staff assists in arranging for SILC meetings, including committee meetings, and providing the minutes of the meetings.
- The DSU program manager assists with drafting correspondence and other documents. However, because the documents represent the SILC, they are reviewed, approved, and signed by the chair of the SILC.
- With SILC input, DSU staff draft and complete contracts related to SILS program. In addition the SILC and DSU collaborate in monitoring contract compliance, which includes site visits related to program visits and arranging AUP reviews for financial compliance.
- The DSU program manager reviews possibilities for additional funding for the SILC, CILs and DSU to support IL activities and provides suggestions and support in pursuit of additional funding, if time is available.
- With SILC input, DSU staff develops SILC materials for use in activities such as orientation of new members.
- With SILC input, DSU staff develop marketing strategies to promote the SILC and SILC activities, i.e. logo, brochure, etc.

With regard to fundraising, ideas for fund raising occur in committees and sometimes responsibility for fundraising activities is assigned to committees. Occasionally fund raising ideas develop in the full SILC. The committee or SILC may develop plan for raising funds. At times, the program manager is assigned duties related to the fundraising. The most common activity involving the program manager is drafting grant applications. In general, then one of the CILs is assigned as the applicant for the grant and that CIL reviews the application before it is sent in. Funds are not received by the SILC at this time; either the DSU or a CIL is the recipient

of the funds. For instance legislative general funds are always allocated to the DSU for distribution to the CILs. A recent Social Security grant was awarded to NCILS who contracted with the other Centers to allow for state wide provision of services under the grant. Should the SILC establish itself as a 501 (c) (3) status, one of the activities that have been discussed is that the SILC could be more active in fund raising because it would have the capability of receiving its own funds.

4.1B Describe other DSU arrangements for the administration of the IL program, if any.
NA

Section 5: Statewide Independent Living Council (SILC)

5.1 Resource plan – 34 CFR 364.21(i)

5.1A Describe the resource plan prepared by the SILC in conjunction with the DSU for the provision of resources, including staff and personnel, made available under parts B and C of chapter 1 of title VII, section 101(a)(18) of the Act, and from other public and private sources that may be necessary to carry out the functions of the SILC identified in section 705(c). The description must address the three years of this SPIL.

Budget

	<u>2008</u>	<u>2009</u>	<u>2010</u>
Meeting Expenses (includes travel to meetings)	\$11,220	\$11,220	\$11,220
Consulting	\$ 4,500	\$ 4,500	\$ 2,782
Supplies	\$ 200	\$ 200	\$ 200
Communications	\$ 2,500	\$ 2,500	\$ 2,500
Travel	\$10,239	\$ 2,907	\$ 1,000
Other:	<u>\$ 500</u>	<u>\$ 500</u>	<u>\$ 500</u>
Total	\$29,159	\$21,827	\$18,202

The sources of funding for the above budget are from (Part B + match) and \$11,220 (Section 110 + match). The Part B amount varies each year of the SPIL, but the Section 110 + match is expected to stay the same throughout 2008-2011.

In addition to the above budget, there are in-kind contributions from the DSU as described in Section 1.3 B (2).

The SILC has no staff, but benefits from the efforts of the DSU program manager and other support provided through Part B funds assigned to the DSU for administration expenses of Part B grant. While the SILC resource plan seems low, a large portion of the “other SPIL activities” budget is the program manager salary and fringe and a significant amount of the program manager’s time is dedicated to activities requested by the SILC.

5.1B Describe how the following SILC resource plan requirements will be addressed:

- **The SILC’s responsibility for the proper expenditure of funds and use of resources that it receives under the resource plan.**

The funds supporting the SILC resource plan will be handled through a separate account number within the DSU fiscal operation. While approval within the fiscal system is provided by DSU

personnel, the SILC and specifically the SILC chair or chair's designee are consulted and provide guidance on expenditures and documentation of the SILC chair's involvement in authorization is maintained. Also, the SILC chair or their designee reconciles recorded expenditures with the approval of expenditures on at least a quarterly basis. The SILC chair is responsible for the appropriate use of the funds and ensuring that expenditures are not made beyond the budget for SILC resources.

A primary task that has been funded under the SILC resource plan in previous SPILs is the IL symposium, which helped to set legislative issues and agendas. The SILC legislative/advocacy committee has developed a new plan for conducting these activities and the CILs have agreed to share part of the cost. The activity that used to cost over \$20,000 from the SILC resource plan, now costs less than \$500 (from the current year's budget and this commitment can be maintained in the above budget. If the SILC cannot cover similar costs in the third year this SPIL, the CILs have committed to covering the expenses.

The SILC has reviewed the budget carefully and believes it can meet its obligations in the SPIL.

The SILC has developed the current budget on historic operational expenses, the one item that is significantly cut back relates to travel to out-of-state conferences. Such travel will probably not be possible in the last year of the SPIL. There have been two recent events that assisted many SILC members to get exposure to the IL and SILC activities in other states, which in the past has been the primary purpose of out-of-state conferences. The first event was a regional conference in Wyoming earlier this year that made it reasonable for almost half of the SILC to attend one conference that allowed for interaction with several states. The second event will be in October 2007. At that time, the Association for Rural Independent Living is holding their national conference in Missoula, Montana. The SILC plans to have a regular SILC meeting in conjunction with this meeting and therefore travel costs for the actual conference will be minimal and all SILC members attending will have exposure to many states and the variety of models of IL, CIL, and SILC activities. Therefore, more SILC members in the third year of this SPIL will have been exposed to the models in other states than would have occurred under the past practice of sending 2 SILC members at a time to 2 or 3 conferences a year at significant expense each year. It is the cutting of out-of-state traffic that is significant difference in this SPIL SILC resource plan from those of previous SPILs. In addition, CIL directors usually attend the conferences involved and can report back to SILC on the information that might be utilized in Montana.

– Non-inclusion of conditions or requirements in the SILC resource plan that may compromise the independence of the SILC.

In order to access the support of the DSU fiscal services to support the SILC resource plan, the SILC accepts the state rates for mileage, meals, lodging, and council member reimbursement.

– Reliance, to the maximum extent possible, on the use of resources in existence during the period of implementation of the State plan.

All resources for the SILC resource plan come from Part B funds, Title 1 funds or state matching funds. The state matching funds have been approved for the first two years of the plan. The other funds are expected federal allocations.

5.2 Establishment and Placement – 34 CFR 364.21(a)

Describe how the establishment and placement of the SILC ensures its independence with respect to the DSU and all other State agencies.

The SILC was established by Executive Order of the Governor. The SILC is not established as an entity within any State agency, including the DSU and is independent of the DSU and all other State agencies. The following is a brief description of the legal status and placement of the SILC:

The SILC is a free-standing body whose members are appointed by the Governor. Although it has autonomy and is self-governing, it does not have legal status independent of the DSU and receives some administrative support from the DSU.

The organization chart that is attached to this document lists the SILC as independent. The SILC is not required to report to any entity in state government and makes reports to RSA to meet federal requirements.

The SILC elects the SILC chair and other officers. The executive committee of the SILC is responsible for implementing the intentions of the SILC which are expressed through actions taken during the regular meetings of the SILC. The executive committee shall have the authority of the SILC in the management of the business of the SILC between meetings of the SILC, subject to the policies established by the SILC.

Within the first year of this plan, there will be a work group formed to explore the option of the SILC establishing a 501 (c) (3) to establish a legal status outside of the DSU and to have a mechanism for receiving and independently administering the funds in the SILC resource plan. Recommendations from the work group will be received by January 1, 2009. Further actions and timelines will be dependent on the recommendations of the work group.

Should the above procedure result in a recommendation of not pursuing a 501 (c) (3) or the plan for the pursuit of this status proves unsuccessful, the SILC will review whether or not to pursue other options related to placement within the state government.

5.3 Appointment and Composition – 34 CFR 364.21(b) – (f)

Describe the process used by the State to appoint members to the SILC who meet the composition requirements in section 705(b).

- When a vacancy occurs, the nominations committee recruits potential members to the SILC.
- The nominations committee makes recommendations to the SILC to fill upcoming or existing vacancies on the SILC based on a review of SILC applications that focuses on federal requirements for SILC membership.
- The SILC approves a list of candidates for appointment to the SILC.
- The SILC approved list of candidates is forwarded to the Governor's office with a request to fill upcoming or existing vacancies on the SILC.

- At all times, the Governor has open applications for all state councils and boards on the Montana website. The Governor may receive applications outside of the SILC review process through this source or other activities of his/her choosing. However, his staff are kept aware of the requirements for serving on the SILC and requirements related to maintaining a majority of members who have a disability who are not employed by a CIL or state agency and other membership requirements.
- The Governor selects candidates to fill upcoming or existing vacancies and the Governor's office sends out appointment letters.
- The SILC chair is elected by the voting membership of the SILC in even numbered years. The chair must be a voting member of the SILC.
- Term limits are maintained by keeping records of when a member is appointed to the SILC and the date of the end of their term and which term they are in (1st or 2nd). This information is distributed to all SILC members and is to be maintained in their SILC manual.

5.4 Staffing – 34 CFR 364.21(j)

Describe how the following SILC staffing requirements will be met:

- **SILC supervision and evaluation, consistent with State law, of its staff and other personnel as may be necessary to carry out its functions.**

The SILC does not have staff. The SILC utilizes DSU staff that is assigned to assist the SILC. The SILC is involved with the evaluation, hiring, and supervision of the DSU program manager who is the primary staff person assigned to assist the SILC. The chair of the SILC is consulted in developing the evaluation of the DSU program manager and will note if there are deficiencies in the program manager's performance with regard to responsibilities related to the SPIL. Also, the current supervisor of the DSU program manager is the ex-officio member from the DSU on the SILC and is member of SPIL committee which conducts ongoing evaluation of SPIL progress. Therefore, the supervisor will also be monitoring the program manager's activities in this regard.

- **Non-assignment of duties to SILC staff and other personnel made available by the DSU, or any other State agency or office, that would create a conflict of interest while assisting the SILC in carrying out its duties.**

No duties are assigned to DSU personnel made available by the DSU or any other State agency or office that would create a conflict of interest while assisting the SILC in carrying out its duties.

Section 6: Service Provider Requirements

6.1 Staffing – 34 CFR 364.23; 34 CFR 364.24; 34 CFR 364.31

- **Inclusion of personnel who are specialists in the development and provision of IL services and in the development and support of centers.**
- **Availability, to the maximum extent feasible, of personnel able to communicate (1) with individuals with significant disabilities who rely on alternative modes of communication, such as manual communication, nonverbal communication devices, Braille, or audio tapes and (2) in the native languages of individuals with significant disabilities whose English proficiency is limited and who apply for or receive IL services under title VII of the Act.**

- Establishment and maintenance of a program of staff development for all classes of positions involved in providing IL services and, where appropriate, in administering the CIL program, improving the skills of staff directly responsible for the provision of IL services, including knowledge of and practice in the IL philosophy.
- Affirmative action to employ and advance in employment qualified individuals with significant disabilities on the same terms and conditions required with respect to the employment of individuals with disabilities under section 503 of the Act.

Requirements to meet the above criteria are included in the contracts for IL services.

Compliance by the service providers are monitored by reviewing the annual reports of the contractors and site visits described earlier in this plan.

6.2 Fiscal Control and Fund Accounting – 34 CFR 364.34

- Adoption of those fiscal control and fund accounting procedures as may be necessary to ensure the proper disbursement of and accounting for funds made available through parts B and C of chapter 1 of title VII of the Act, in addition to complying with applicable EDGAR fiscal and accounting requirements.

Requirements to meet the above criteria are included in the contracts for IL services.

Compliance by the service providers are monitored by reviewing the annual reports of the contractors and reviews of agreed upon procedures described earlier in this plan.

6.3 Recordkeeping, Access and Reporting – 34 CFR 364.35; 34 CFR 364.36; 34 CFR 364.37

- Maintenance of records that fully disclose and document the information listed in 34 CFR 364.35.
- Submission of annual performance and financial reports, and any other reports that the Secretary determines to be appropriate
- Access to the Commissioner and the Comptroller General, or any of their duly authorized representatives, for the purpose of conducting audits, examinations, and compliance reviews, to the information listed in 34 CFR 364.37.

Requirements to meet the above criteria are included in the contracts for IL services.

Compliance by the service providers are monitored by reviewing the annual reports of the contractors, site visits described earlier in this plan, and monitoring responses to requests for access by the Commissioner and the Comptroller General, or any of their duly authorized representatives for the purpose of conducting audits, examinations, and compliance reviews, to the information listed in 34 CFR 364.37

6.4 Eligibility – 34 CFR 364.40; 34 CFR 364.41

- Eligibility of any individual with a significant disability, as defined in 34 CFR 364.4(b), for IL services under the SILS and CIL programs.
- Ability of any individual to seek information about IL services under these programs and to request referral to other services and programs for individuals with significant disabilities.
- Determination of an individual's eligibility for IL services under the SILS and CIL

programs in a manner that meets the requirements of 34 CFR 364.51.

- **Application of eligibility requirements without regard to age, color, creed, gender, national origin, race, religion, or type of significant disability of the individual applying for IL services.**
- **Non-exclusion from receiving IL services of any individual who is present in the State and who is otherwise eligible for IL services, based on the imposition of any State or local residence requirement.**

Requirements to meet the above criteria are included in the contracts for IL services.

Compliance by the service providers are monitored by reviewing the annual reports of the contractors and site visits described earlier in this plan.

6.5 Independent Living Plans – 34 CFR 364.43(c)

- **Provision of IL services in accordance with an IL plan complying with Sec. 364.52 and mutually agreed upon by the individuals with significant disabilities and the appropriate service provider staff unless the individual signs a waiver stating that an IL plan is unnecessary.**

Requirements to meet the above criteria are included in the contracts for IL services.

Compliance by the service providers are monitored by reviewing the annual reports of the contractors and site visits described earlier in this plan.

6.6 Client Assistance Program (CAP) Information – 34 CFR 364.30

- **Use of accessible formats to notify individuals seeking or receiving IL services under chapter 1 of title VII about the availability of the CAP program, the purposes of the services provided under the CAP, and how to contact the CAP.**

Requirements to meet the above criteria are included in the contracts for IL services.

Compliance by the service providers are monitored by reviewing the annual reports of the contractors and site visits described earlier in this plan.

6.7 Protection, Use and Release of Personal Information – 34 CFR 364.56(a)

- **Adoption and implementation of policies and procedures meeting the requirements of 34 CFR 364.56(a), to safeguard the confidentiality of all personal information, including photographs and lists of names.**

Requirements to meet the above criteria are included in the contracts for IL services.

Compliance by the service providers are monitored by reviewing the annual reports of the contractors and site visits described earlier in this plan.

Section 7: Evaluation

Describe the method that will be used to periodically evaluate the effectiveness of the plan in meeting the objectives established in Section 1. The description must include the State's evaluation of satisfaction by individuals with significant disabilities who have participated in the program. 34 CFR 364.38

The following narrative describes the state's evaluation plan, including methods for the periodic evaluation of the effectiveness of the SPIL in meeting the objectives.

- Yearly self-evaluations to meet the expectations of the 704 reporting system.

- Quarterly reviews, conducted by the SILC and program manager from the DSU, of CIL data, relevant to the 704 reporting data; the SPIL and, Part B and General Fund contract compliance requirements.
- Every-other-year on-site reviews for the overall monitoring and evaluation of Part B and State General Funds by the SILC and IL program manager from the DSU. Procedures for this process are in place and will be reviewed annually.
- Public hearing procedures with emphasis placed on consumer input.
- Satisfaction surveys distributed and tabulated annually. Results will be provided to the CILs and SILC to be used to assist independent living programs to improve, change, or support center activities.
- The SILC SPIL Evaluation Committee and the DSU, with participation of the CILs, will review, evaluate and report on compliance of the SPIL. The SILC will conduct a minimum of one annual meeting to evaluate and update the SPIL as needed.
- At the SILC symposium, evaluation forms will be distributed, collected and tabulated to assess the symposium success and assist with planning subsequent symposiums.
- Discussions/interviews with consumers.
- Within one month of the initiation of the plan, an evaluation chart will be drafted that indicates milestones related to responsibilities in the SPIL, including reoccurring responsibilities, the time line will also include responsibility parties for various activities of the SPIL. The evaluation committee will review the evaluation chart on at least a quarterly basis to monitor progress of SPIL activities. Should there be a need for a plan to address areas where activities are not meeting the expectations of the SPIL a strategy will be developed by committee to address the issue and forwarded to the executive committee for approval and implementation.

Section 8: State-Imposed Requirements

The following narrative describes the State's evaluation plan, including methods for the periodic evaluation of the effectiveness of the SPIL in meeting the objectives.

Identify any State-imposed requirements contained in the provisions of this SPIL. Indicate N/A if not applicable. 34 CFR 364.20(h)

In order to utilize the state accounting system for fiscal transactions the SILC agrees to follow state rates for lodging, mileage, and meals.

Grant funds coming into the state must be appropriated through the legislature under the following guidelines:

MT Constitution, article 5, section 11, subsections 4 & 5.

(4) A general appropriation bill shall contain only appropriations for the ordinary expenses of the legislative, executive, and judicial branches, for interest on the public debt, and for public schools. Every other appropriation shall be made by a separate bill, containing but one subject.

(5) No appropriation shall be made for religious, charitable, industrial, educational, or benevolent purposes to any private individual, private association, or private corporation not under control of the state.

Also, monitoring of compliance related to fiscal issues is necessary to ensure compliance of contracts related to the SPIL.

The state charges indirect costs to the Part B grant.

APPENDIX ORGANIZATION CHART

DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES
DISABILITY SERVICES DIVISION
VOCATIONAL REHABILITATION PROGRAMS

